



# FISCAL YEAR 2022 BUDGET EQUITY INSTRUCTION MANUAL

*“Advancing equity is a social and moral imperative that is **everyone’s job**, and we have an ambitious equity initiative that involves the tough, steady work of reflection, policy revision, and universal commitments to a just and equitable future.”*

*- City Manager, Erik Walsh*



CITY OF SAN ANTONIO  
OFFICE OF EQUITY

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# CITY OF SAN ANTONIO - FISCAL YEAR 2022

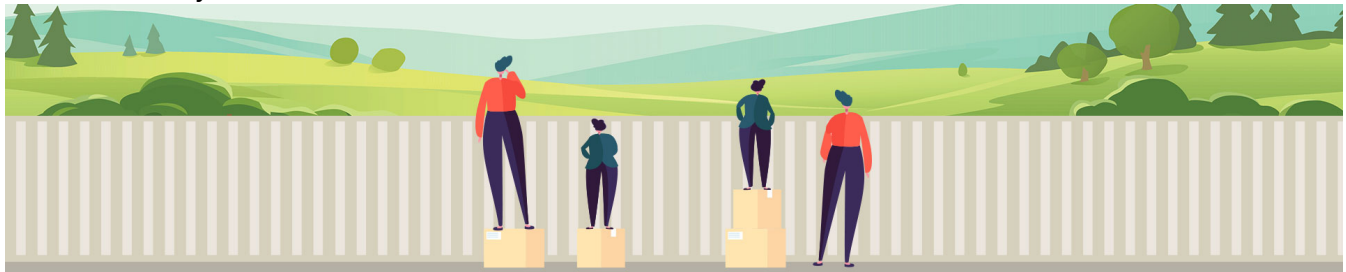
## BUDGET EQUITY TOOL

### Budgeting for Equity Introduction

The City of San Antonio's (COSA) Budget Equity Tool (BET) is designed to integrate explicit considerations of racial and economic equity into the budget development process. Citywide application of this uniform tool provides City Departments and Offices with a structured way to apply equity concepts to key decision-making processes around resource allocation and assess equity impacts of budgetary decisions.

### Design

The BET is both a product and a process, designed as a set of questions that guide City Departments towards assessing how their budgets benefit and/or burden communities, specifically communities of color and low-income communities. These questions aim to ensure that Departments apply rigor to their program evaluation methods, so that COSA can collectively develop strategies and actions that will reduce racial and economic inequities in the community.



Equality Versus Equity

### Budget Equity Tool Goals

1. Analyze the Department's overall approaches to funding equity efforts.
2. Identify which programs help to advance equitable outcomes for residents.
3. Assess the equity impacts of budget decisions for potential benefits and burdens on communities of color and low-income communities.
4. Ensure that programs, projects, plans and investments help to reduce disparities experienced by the City's most marginalized community members.



# BET PROCESS

Four budgeting for equity questions are embedded directly into the budget documents that will come from the Office of Management and Budget (OMB). The budget memos, instructions, and deadlines will be managed by OMB. Departments will submit everything to OMB directly, and the Office of Equity will provide the training and technical support associated with the budget equity questions. The Office of Equity will complete a strengths and opportunities review of all submissions after all completed budget materials are submitted to OMB.

## Fiscal Year 2022 Budget Equity Tool Questions

### Entire Department Budget

1. Describe how your budget allocates funds in ways to advance racial and economic equity. Consider a global view (not program-level) in how funds are allocated to reduce or eliminate disparities and improve outcomes for low-income communities and communities of color.

### Program Specific Budgets

1. Does this program apply an equity matrix or equity lens in the allocation of funds? (Yes/No)
2. (If Yes): What specific racial and/or economic inequities in San Antonio does this program intend to address/reduce?
3. (If Yes): What metrics will the Department use to evaluate or assess the program's impact on communities of color and low-income communities?

## Key Terms (Full Glossary in Appendix)

**Equity** means fair and just opportunities and outcomes for all people.

**Racial equity** is the elimination of systemic and institutional racism, so that all racial and ethnic groups can prosper and reach their full potential.

**Budget:** for the purposes of this tool, the term budget includes your entire Departmental funds, including funds from all sources such as the general fund, restricted funds, grants, etc.



Entire Budget

Global view of your budgeting for equity efforts



Programs

Reduce specific racial and economic inequities through programmatic funding allocations



Evaluation

Evaluate the equity impacts of your programs

## Entire Department Budget

The first question asks you to provide an analysis of how you are considering equity within your complete budget, which you can think of as your whole pie. Within that pie, how are you allocating staff time to advance equity efforts? How are you providing enough resources to teams and divisions that help address the needs of low-income communities and communities of color? How is your equity work explained in your overall strategic plan and division work plans?

## Program Specific Budgets

The program specific budget questions are asked for each distinct program within your Department or Office. If your Department or Office does not have programs, you will not need to answer these questions. Programs do not all have to include an equity approach, so only answer these questions for programs that will explicitly be applying equity methodologies to them next Fiscal Year, and be strategic about where equity should and should not be applied to have maximum benefit to our most marginalized community members. We do not expect all programs to apply an equity matrix or lens to them.

## Technical Assistance

Office of Equity staff and Citywide Equity Committee (CEC) members will provide technical assistance to their respective Departments related to the BET questions. The **Office of Equity** supports the budgeting for equity effort through the annual updates to the tool itself, the creation and facilitation of the necessary trainings, responding to technical assistance requests, and by providing a strengths and opportunities review to Departments.

Zan Gibbs	Jonathan Butler	Amy Casso	Jonathan Malagon
City Auditor	Aviation	311	CCDO
City Council	CAO	ACS	Development Services
City Managers	Convention & Sports	Arts & Culture	Finance
Office	EDD	BESD	SAFD
SAMHD	GPA	DHS	Human Resources
SAPD	Innovation	ITSD	Office of Sustainability
Public Works	Municipal Courts	Library	OMB
Transportation	NHSD	OHP	Parks & Recreation
	Office of the City Clerk	Pre-K-4SA	
	Planning	WHO	
	Risk Management		
	SWMD		

**CEC members** are equity resources who can support leadership in their respective Departments in completing the tool. However, CEC members are not solely responsible for completing their Department's responses. The Office of Equity encourages Departments to organize a team that includes their CEC member and is tasked with responding to the BET questions.

# SUPPLEMENTAL INFORMATION

## Submission

1. **Submit only one completed tool per Department, and limit your responses to the space provided**  
The BET should reflect an analysis of each Department's entire budget and each of the Department's programs. These decision points should be analyzed as part of the comprehensive effort that your Department is undertaking in addressing equity in programs, plans, and policies.
2. **The responses should include an analysis of Departments' entire budget for fiscal year 2022**  
The BET is an equity analysis of everything that do, and how you allocate your funds within your Department. How you maximize your resources for efforts that help advance equity are one way to measure the Department's ongoing commitment to advancing equity.
3. **Gather demographic data to help your Department to determine benefits and burdens of new decisions and the entire budget**  
Department-specific data that is disaggregated by race and income can also be used to support your Department in determining the impact of proposed policies, plans, and programs, to inform budgetary decisions.

## Office of Equity

The Office of Equity is a citywide office focused on advancing social equity within the City of San Antonio, to help reduce and ultimately eliminate disparities experienced by our most marginalized San Antonio residents. The Office of Equity does this through supporting City Departments in normalizing concepts of equity, organizing staff to work together for transformational change, and operationalizing new practices, policies and procedures that are equity oriented. The BET is an integral component of these three strategies, which align to advance social justice in government.

2020 has highlighted just how much systemic and institutional racism have created huge racial and economic disparities in this country. We have seen worsening outcomes for people of color in many areas, but we nationally we have all borne witness to especially widening gaps in areas of health outcomes, economic prosperity, and housing stability. In recognizing that at the City of San Antonio we are "One Team, One Mission", the Office of Equity has prioritized the following five areas for our work in 2021, so that we can all work together to help eliminate racism and improve outcomes for all our residents:

1. Capacity Building - **Build** awareness of systemic racism and equity strategies within Departments
2. Organizing Staff - **Organize** staff to support the advancement of equity efforts throughout the City
3. Data and Transparency - **Increase** access to data relevant to equity work, via things such as the ESRI GIS, the Equity Atlas and Matrix, and the Racial Equity Indicator Report
4. Budgeting for Equity - **Advance** equity in budgeting, programs, and services
5. Equitable Recovery - **Improve** outcomes for marginalized community members in housing stability, health equity and economic prosperity



# APPENDIX

## Best Practices for Budgeting for Equity

### 1. **Applying an Equity Lens:**

Social and racial inequities are not random, natural, or inevitable. For example, in describing inequities in health outcomes across populations, the World Health Organization states that “the unequal distribution of health-damaging experiences is not in any sense a ‘natural’ phenomenon, but the result of a toxic combination of poor social policies and programs, unfair economic arrangements, and bad politics.” Institutional decisions influence inequities. It is therefore essential to use an equity lens (equity thinking) when changing programs, plans, and policies that may perpetuate inequities, and when developing new programs, plans, and policies. Applying an equity lens can help Departments reflect on how budgetary decisions burden or benefit underserved communities, particularly communities of color and low-income communities, and the BET will be the instrument Departments will use to answer specific questions that help get to different solutions.

### 2. **Be Equity Data Driven:**

What population-level data is driving your Department’s budget decisions? What does this data tell us about how communities of color and low-income communities are faring, and how will we measure progress in these communities? How will we disaggregate data by race and income? If you are proposing a program that will impact a specific geographic area, what are the racial and income demographics of the people who live in that area? The BET will support your Department with the ability to reflect on these questions in making budgetary decisions, with the goal of ensuring high-quality and equitable services for all residents.

### 3. **Strengthen Equitable Community Engagement Efforts:**

While it is essential for jurisdictions to adopt equity lens thinking and have equity tools to assist in decision-making, including budget development, this orientation alone is insufficient. Departments need to work in partnership with all communities, lifting up the voices and needs of those most marginalized, to achieve meaningful results. City government must be intentional in facilitating community outreach, public engagement, and access to City services for all communities, especially communities of color and low-income communities.

### 4. **Be Accountable:**

Every City Department has an important role in reducing inequities; from fairness in hiring and promotions, providing equitable services for communities throughout the City, facilitating community participation and engagement, or creating greater opportunities in contracting. Make a Departmental commitment to advance equity in the City by setting goals and measuring progress. This will help your Department in prioritizing certain programs, plans, and policies reflected in your budget. Decide how and who will track progress towards meeting these goals, and how you will communicate this progress to leadership.

## Select Departmental Highlights Fiscal Year 2021 Budget Equity Tool Process

### **311**

Conduct a Service Review of 311 requests to identify patterns, gaps in services and/or any new service requests or language needs. 311 would like to assess the service requests in conjunction with data from the Equity Atlas to see if there are gaps. This could be useful for Departments in conducting targeted outreach and useful for 311 training prep.

### **Arts and Culture**

Arts Agency Funding - Grant funding for San Antonio arts agencies through the Cul-TÚ-Art Plan is distributed with an equity lens. Guidelines and requirements for non-profit arts agencies in the categories of Festivals, Artist Re-granting, Base Operational Support, Culturally Specific Support, and Capacity Building are designed with agency size, capacity, and demographics of staff and population served in mind.

### **BESD**

Review Salaries and Requirements - Working with Human Resources, BESD will analyze the pay gaps and especially for hard-to-fill positions and any COVID-related operations. BESD would like to identify opportunities for existing staff and “second chance” employment opportunities for hard to fill jobs.

### **CCDO**

CCDO will work with Centro, SAGE and the Westside Development Corporation to ensure minority-owned businesses at La Villita and Market Square have access and assistance to apply for the COVID-19 Micro-Business Grant recovery funding. These funds will help businesses pay rent, utilities, and employ workers during this crisis when sales are significantly reduced.

### **DSD**

Development Services will analyze racial and economic data, and will utilize the Equity Matrix, to ensure that most of the abatement assistance—including the possibility of waiving abatement invoices—meet the needs of low-income property owners and people of color.

As part of the UDC update, Development services is easing restrictions on urban farms to increase access to quality food in low-income communities and communities of color.

### **Human Resources**

Workforce Demographics Dashboard - HR continues its FY20 commitment to co-creating a City of San Antonio Workforce Demographics Dashboard into FY21 with ITSD and the Office of Equity, to support diversity initiatives, Affirmative Action policies and plans, and inform the upcoming creation of Departmental Equity Action Plans in every Department.

### **Human Services**

Commitment to building systemic opportunities by providing targeted services and supporting community engagement among traditionally marginalized members of the community, including communities of color and low-income communities. This will include committees at individual site locations, program wide commissions and committees, and



Department-supported boards and commissions, including those with governance/decision making authority.

### **Innovation**

Digital Equity Plan: in collaboration with Digital Inclusion stakeholders create a plan with priority initiatives and metrics to track progress.

R&D Symposium- will allocate time to gather input from community on challenges, needs, and opportunities with intentional effort on utilizing the Equity Atlas to engage with residents in low income communities and communities of color.

### **Neighborhood and Housing Services Department**

Continued progress through the *ForEveryoneHome* Initiative which identifies anti displacement strategies with a specific focus on low income communities of color and a broad community input process.

NHSD is developing a city-wide initiative to track growth and displacement throughout the city. This tool will be used to target policies, tools, resources, and outreach efforts towards communities (e.g. neighborhoods, zip codes, districts) most vulnerable to experiencing hardship, displacement, and inequity in a rapidly growing city. This will make way for equitable growth, prioritization of areas, and tailored outreach.

### **Parks and Recreation**

The Parks and Recreation Department is committing to collecting and analyzing demographic data (race and income) to guide future decision-making on program offerings and focused outreach efforts. This effort includes adding demographic questions to the FY 2021 program registration to be able to disaggregate data by race and income.

In FY 2021, the Parks and Recreation Department will collaborate with ITSD and the Office of Innovation to use funding provided by the City's COVID-19 Resiliency & Recovery Plan, designated for digital inclusion, to evaluate feasibility of creating "homework hubs" and/or increasing Wi-Fi availability in low-income communities and communities of color.

### **Sustainability**

The Office of Sustainability received funding through the American Cities Climate Challenge (ACCC) to increase capacity of staff and advisory committees to center equity in implementation of the Climate Action and Adaptation Plan (CAAP). Staff and advisory committee members will receive formal equity training phased over FY 2021, that will cover various topics related to racial and climate equity. Office of Sustainability will support internal and external equity training through the ACCC funds and in collaboration with the Office of Equity.

## Additional Resources – Equity Data Tools

**EQUITY ATLAS:** An interactive tool that highlights the demographics, disparities and some infrastructure distribution within the city. Using two demographic variables, race and income, the Office of Equity, the Planning Department, and ITSD have designed a simplified Equity Atlas that focuses on breaking points above and below the citywide averages for those demographic variables. More points are assigned to a census block that has a higher than citywide average concentration of people of color and/or people below the average for median family income, and can be used to guide our investments to achieve citywide equity goals and strategies. <https://www.sanantonio.gov/Equity/Initiatives/Atlas>

**RACIAL EQUITY INDICATOR REPORT:** The Office of Equity developed COSA's first Racial Equity Indicator Report, which *illuminates disparities faced by communities of color across multiple domains*. This Racial Equity Indicator Report quantifies the state of racial equity in San Antonio and features key indicators on racial disparities in income, housing, health, educational attainment, and in other areas. The Racial Equity Indicator Report can be used by City Departments to help prioritize programs and investments to ensure a clear focus on reducing existing racial disparities, and is available on the Office of Equity's website.

**COMMUNITY INFORMATION NOW:** Provides maps of various indicators, including race and ethnicity and median household income: <http://viz.cinow.info/>

**NATIONAL EQUITY ATLAS:** Developed by PolicyLink and PERE, the National Equity Atlas includes citywide data disaggregated by race and income. Examples of available equity indicators include homeownership, wages, unemployment, disconnected youth, school poverty, air pollution, education levels and job requirements, housing burden, car access, neighborhood poverty, asthma, diabetes, etc.: <http://nationalequityatlas.org/indicators>

**STATISTICAL ATLAS:** A comprehensive atlas produced by the Census Bureau, and a source for disparity data: <https://statisticalatlas.com/United-States/Overview>

**SA2020 COMMUNITY DATA DASHBOARD:** A data dashboard compiled by SA2020, giving critical insight to understanding how San Antonio has made progress—even incrementally—and where institutions across sectors must double down to deliver race-conscious, targeted policies, investments, and service: <https://sa2020.org/data>

**TABLEAU RACIAL EQUITY DATA HUB:** Data anyone can use to end racism in their community. To end inequalities, biases, violence, and disenfranchisement, we must first see where they are present. Data is a critical tool in the fight for justice and equity in the United States: <https://www.tableau.com/foundation/data-equity>

## Glossary

Please refer to the following definitions in reflecting on and answering the questions in the BET. Feel free to use these terms and concepts in your response.

**ADVERSE IMPACTS:** Practices or policies that appear neutral but have a discriminatory effect on a protected group. *Source: City of Portland Office of Equity and Human Rights (OEHR)*

**BUDGET:** For the purposes of this tool, the term budget includes general fund, restricted funds and grants. The term 'overall budget' refers to a Department's entire operating budget.

**COMMUNITIES OF COLOR:** A term used primarily in the U.S. to describe communities of people who are not identified as white, emphasizing common experiences of racism. *Source: OEHR*

**COMMUNITY INDICATOR:** The means by which we can measure socioeconomic conditions in the community. All community indicators should be disaggregated by race, if possible. *Source: Government Alliance on Race and Equity (GARE)*

**EQUITY:** Equity means fair and just opportunities and outcomes for all people.

**EQUITY LENS:** A critical thinking approach to undoing racial and economic disparities by evaluating burdens, benefits, and outcomes to underserved communities. *Source: OEHR*

**EQUITY MATRIX:** An equity index with a scoring process that can be used to help rank lists that relate to projects, programs and even procedures. *Source: City of San Antonio*

**INCLUSION:** The action or state of including or of being included within a group or structure. More than simply diversity and numerical representation, inclusion involves authentic and empowered participation and a true sense of belonging. *Source: Annie E Casey Foundation*

**INSTITUTIONAL RACISM:** Policies, practices, and procedures that work better for white people than for people of color, often unintentionally or inadvertently. *Source: National League of Cities*

**INTERSECTIONALITY:** An approach largely advanced by women of color, arguing that classifications such as gender, race, class, sexual orientation, nationality, and others cannot be examined in isolation from one another; they interact and intersect in individuals' lives, in society, in social systems, and are mutually constitutive. *Source: Hollins and Govan: Diversity, Equity, and Inclusion*

**LOW-INCOME:** While there is no single definition to describe people and households that are low-income, many reports define low-income households as those earning less than twice the federal poverty line. For the purposes of determining eligibility for assisted housing programs, HUD defines low-income families as families whose incomes do not exceed 80% of the Median Family Income (MFI) and very low-income families as families whose incomes do not exceed 50% of MFI for the area. The MFI for Bexar County in 2019 was approximately \$71,000.

**PEOPLE OF COLOR (POC):** A term born out of the antiracism movement used to describe nonwhites. The term is meant to be inclusive among nonwhite groups, emphasizing common

experiences of racism and oppression and resistance against it. *Source: Hollins and Govan: Diversity, Equity, and Inclusion*

**RACIAL DISPARITY:** A significant difference in conditions between a racial group and the white population that is avoidable and unjust. *Source: OEHR*

**RACIAL EQUITY:** Racial equity is the elimination of systemic and institutional racism, so that all racial and ethnic groups can prosper and reach their full potential.

**STRUCTURAL RACISM:** A history and current reality of institutional racism across all institutions, combining to create a system that negatively impacts communities of color. *Source: GARE*

**UNDERSERVED:** Refers to people and places that historically and currently have not had equitable resources or access to infrastructure, healthy environments, housing choice, etc. Disparities may be recognized in both services and in outcomes. *Source: OEHR*